

Customer Onboarding Checklist

External Checklist (Tasks / actions that your client is involved in)

- Welcome: Send a welcome email
 - Kick-off Call: Call customer to make personal connection and communicate key project information
 - Expectations: Discuss major milestones and deadlines
 - Process: Reiterate through the entire project process
 - Education: Provide educational and training materials on project process
 - Questionnaire: Get all the information you need for the project
 - Check-In: Check-in with your customers to see if they need help
 - Satisfaction Survey: Get feedback from your customers
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Internal Checklist (Behind-the-scenes tasks / actions)

- Update of CRM: Add customer into your CRM system
- Project List Update: Update customer details, project status and deliverables
- Schedule Training & Checkpoints: Use workflow automation to log the consecutive steps

